Medicaid Day 2 Reporting Site - State User Guide

Last Updated: October 16, 2013

Introduction

The Day 2 Medicaid Reporting Site is designed to allow states to upload, update, and submit key performance indicators to the Centers for Medicare & Medicaid Studies (CMS). CMS has selected Socrata to assist with the development and delivery of the Day 2 Reporting Site.

Registration

To register for a new account:

1. Go to: https://opendata.socrata.com
2. On the top-right corner, click “Sign Up”
3. Complete the registration form, and click “Create My Account”
4. Once you complete your account registration, send an email to: sdis@cms.hhs.gov. Include the following:
    a. Subject: Day 2 Account Registration
    b. Body: Include your:
        i. Full name
        ii. Email
        iii. State
        iv. Permission level (see below)
5. CMS will complete your account registration process and will email you when your account is fully activated.

Permission Levels

There are two permission levels within the performance indicators site:

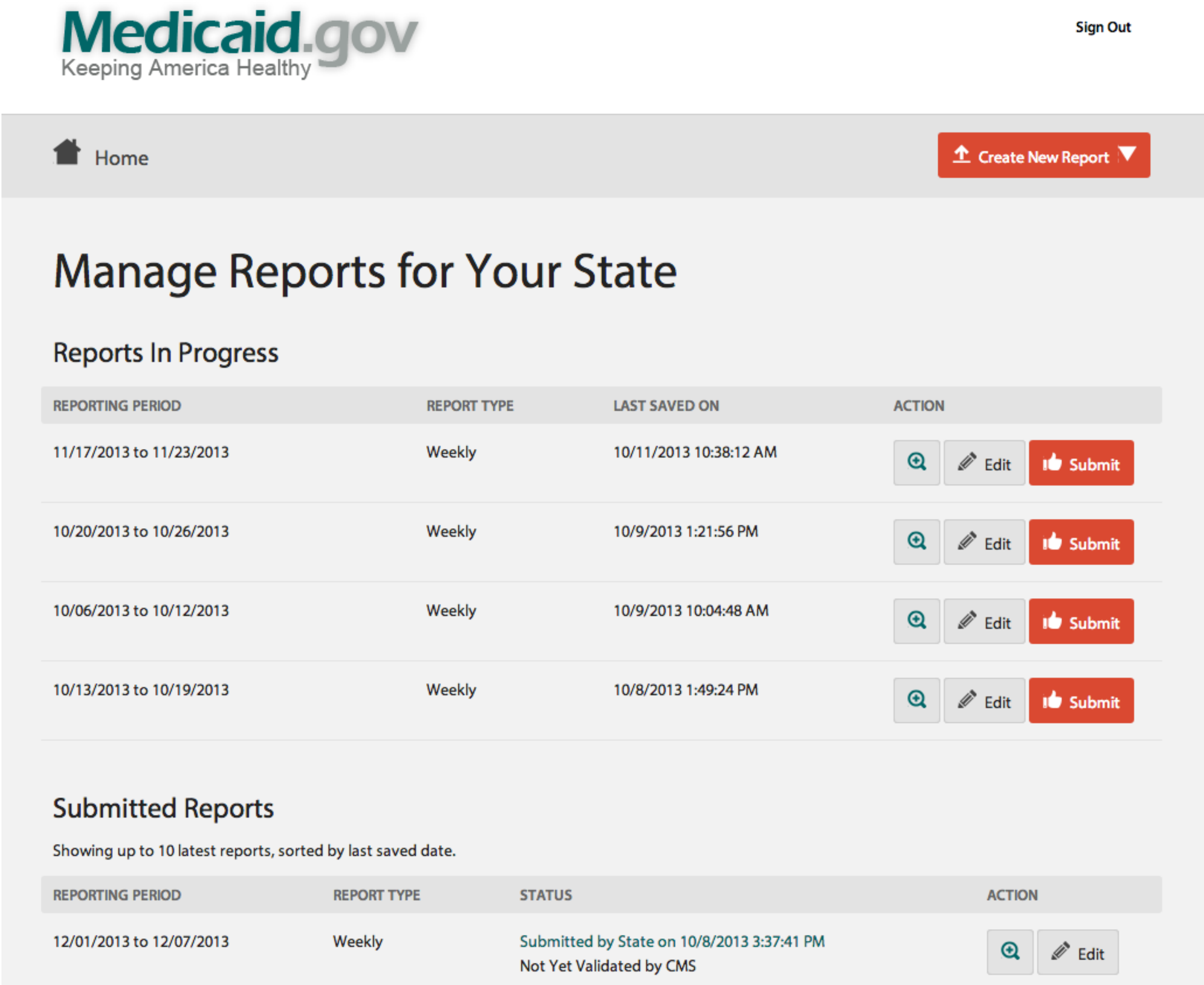
- State Administrator: administrators can create, edit, and approve reports.
- State Viewer: can only view submitted reports. They cannot create, edit, or approve reports.

Login / Site Access

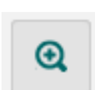
Once your account have been fully activated, you can access the site at: https://sdis.medicaid.gov. Enter your email address and password you used when registering.

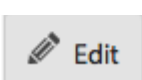
Homepage

When you log into the reporting site, you will see the following screen:



"Reports In Progress"
This area lists reports that have been created, but have not been submitted to CMS by the state. You can take the following actions on these reports:

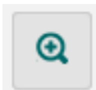
 This button will bring you to a "view only" version of the report. The user will not be able to take action on the report, rather view the submit metrics. This page also is printable for users who prefer to view metrics in paper form.

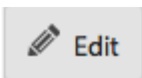


Edit allows the user to edit an existing report. The user can update, change, and re-submit information and metrics.

Submit allows the user to do a final review and eventual approval of the submitted information. The approval process is described below.

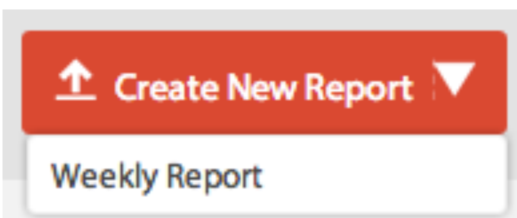
"Submitted Reports"
This section includes reports that were submitted by the state to CMS. Users can view the status of reports in this area. Users can take the following actions:


This button will bring you to a "view only" version of the report. The user will not be able to take action on the report, rather view the submit metrics. This page also is printable for users who prefer to view metrics in paper form.

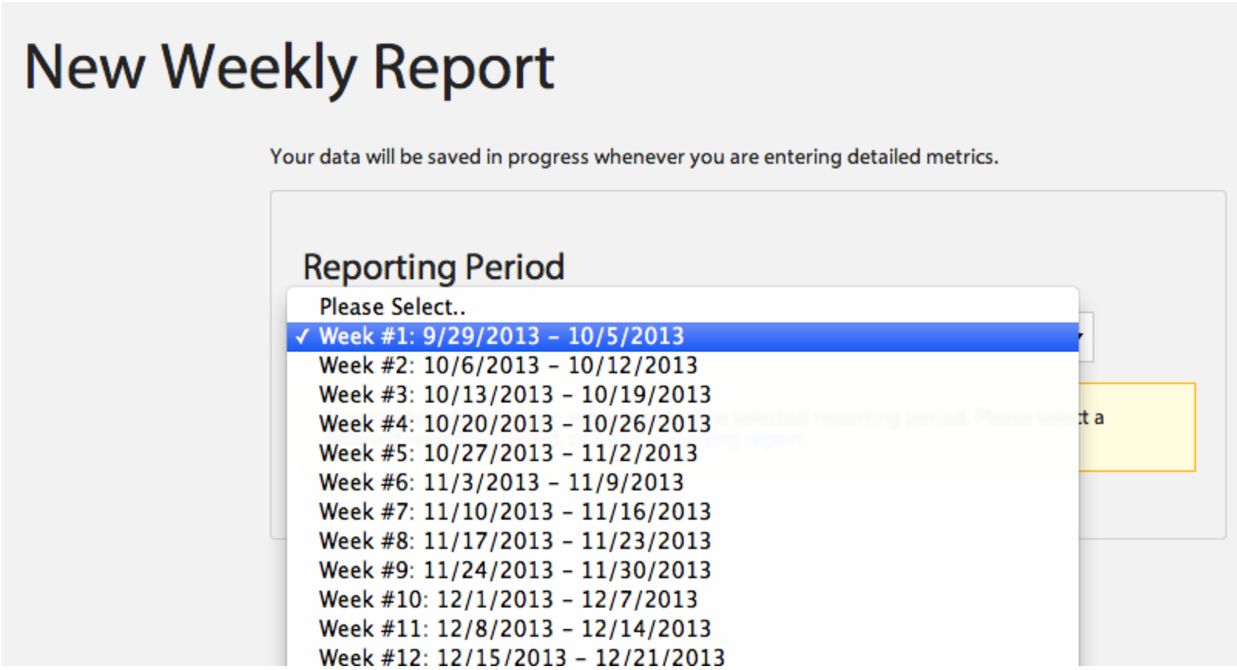


Edit allows the user to edit an existing report. The user can update, change, and re-submit information and metrics. Note: Reports that have been previously approved by CMS require a re-approval by both the state and CMS. See "Editing Previously Submitted Reports" below.

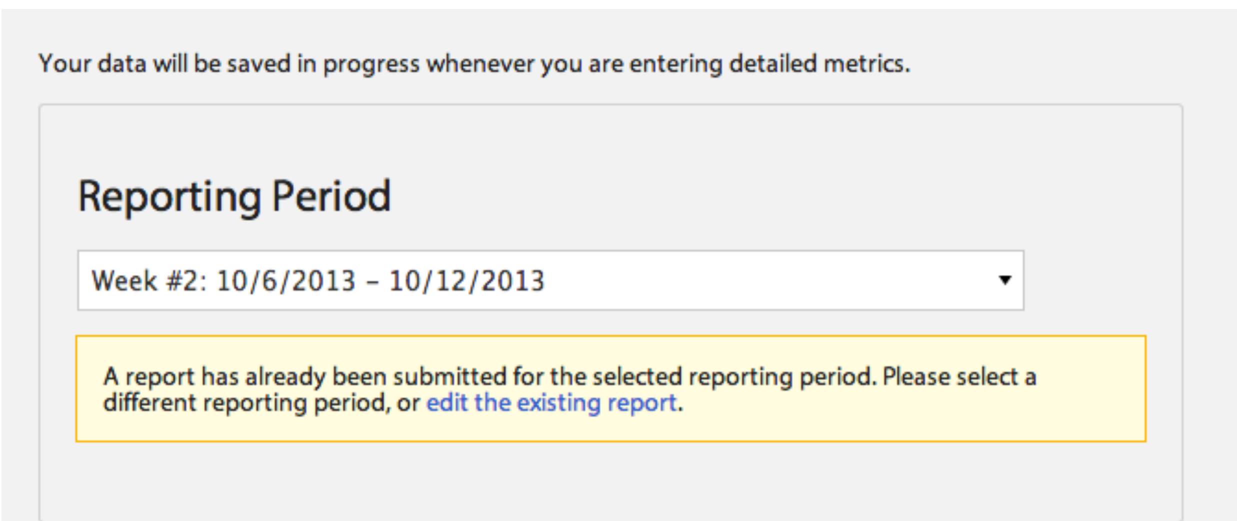
Creating New Reports
To create a new weekly or monthly report, select the "Create New Report" button and select the report type you'd like to submit, as shown below. Your options include weekly or monthly reports.



Step 1: Select Reporting Period
Select the reporting period for which you'd like to submit a new report, as shown below.



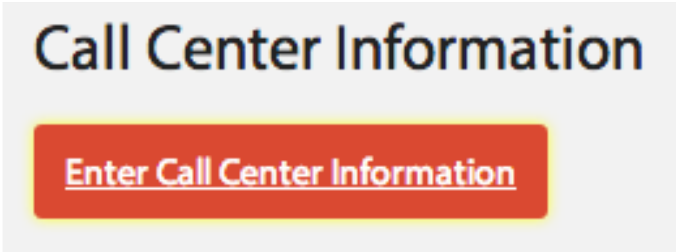
Note: you are only allows to submit 1 report per period. If you try to create a new report for a previously submitted period, you'll receive the following notice:



You can either: a) select a different reporting period, or b) click the "edit the existing report" link to edit the previously submitted report.

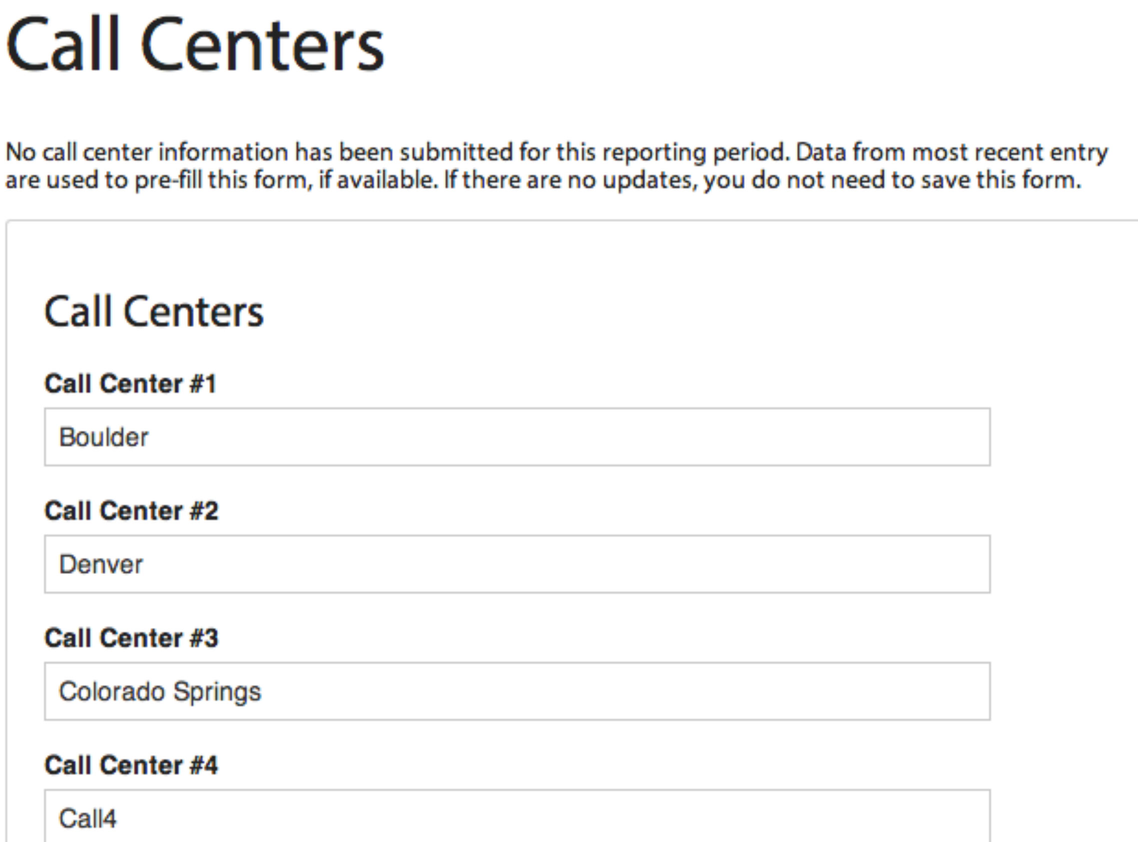
Step 2: Enter Metrics

After selecting your reporting, complete the metrics to the best of your knowledge.

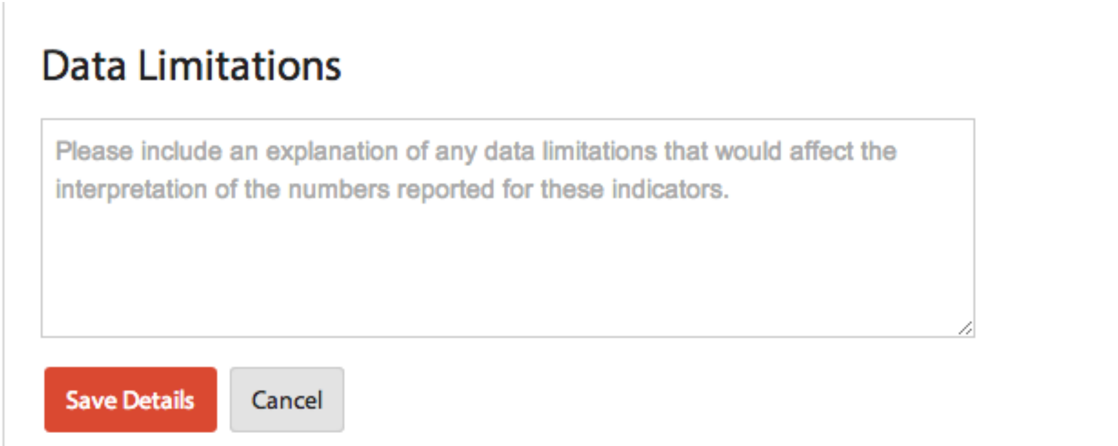


Step 2a: Enter Call Center Information

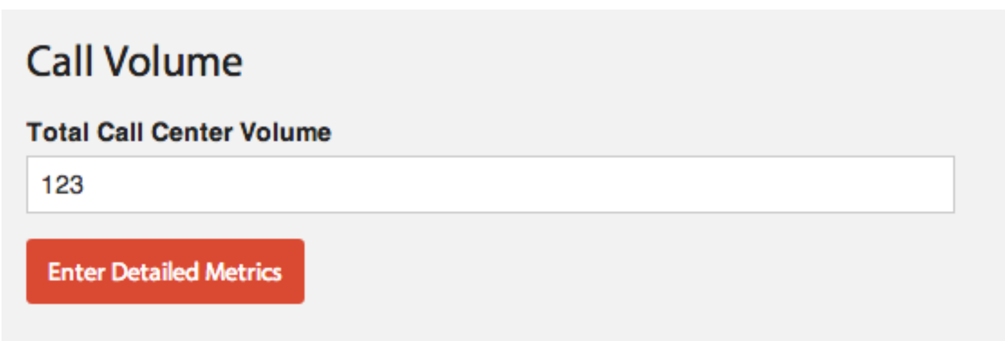
1. Click “Enter Call Center Information”
2. Enter the names/titles of your call centers. You can enter up to 10 call center names, as shown below:



3. When done entering call center names, scroll down and enter any data limitations. Click Save to continue back to the main form.



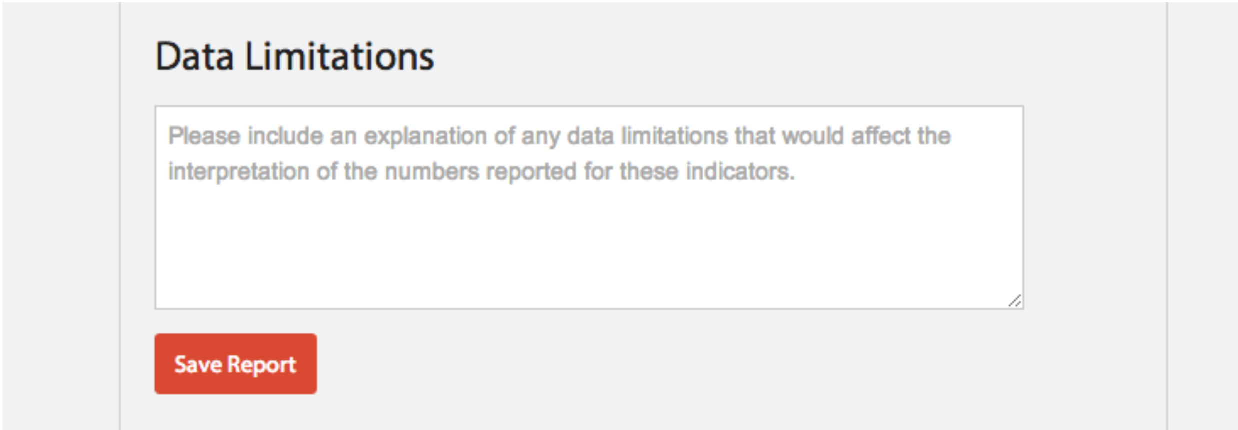
Step 2b: Enter Remaining Metrics
Continue through the form, entering call center volume, abandonment rate, etc. For each performance area, enter the summarized information, as requested (total, average, etc.), then click “Enter Detailed Metrics” for each of the items. For example:



Step 2c: Enter Detailed Metrics
Clicking “Enter Detailed Metrics” will bring you to the sub-metrics outlined in the baseline data. For call center related information, the names of the call centers you entered will be preserved and metrics should be completed appropriately. Leave blank any unused call center blocks.

Each detailed metrics area includes a place to submit data limitations as well as a save button. Save each set of detailed metrics and continue to the next.

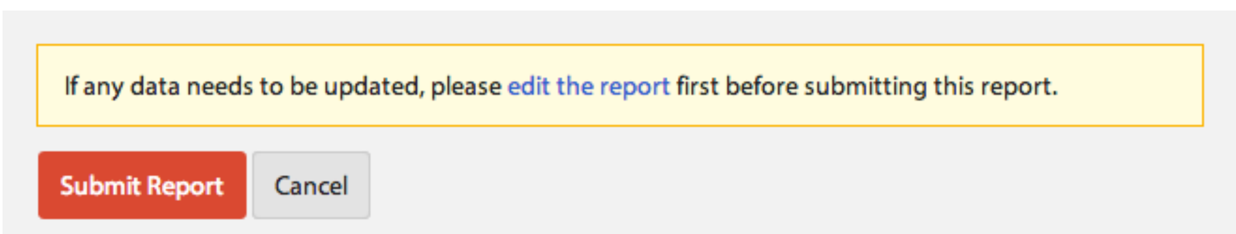
Step 3: Submit New Report
At the end of the new report, you can enter any remaining data limitations. Upon completion of the metrics, click “Save Report,” as shown below.



Editing Reports
To edit a report, click "Edit" on the homepage next to the report you want to edit. Edit the metrics you want to change, and click "Save Report." You will then be taken back to the homepage.

Submitting Reports
Each state must approve each submitted report prior to review by CMS. To submit a report:

1. On your homepage, click "Submit" next to the report you want to submit to CMS.
2. Review the data submitted.



3. To edit the data submitted, click on "edit the report."
4. To approve the report, click "Submit Report."
5. By submitting your report, it will be sent to CMS for final review and validation.

Viewing Reports
Viewing a report on your homepage will take you to a view-only screen. The top portion of the page shows you information on who submitted the report, when it was submitted, and if it's been approved, who did the approval and when, as shown below.

Information

Reporting Period:	10/27/2013 – 11/02/2013
State:	Colorado
Submitted:	by State Test Admin at 10/4/2013 2:02:35 PM
Last Updated:	by State Test Admin at 10/4/2013 2:07:48 PM
State Approval:	Pending
CMS Approval:	Pending

To view the detailed metrics, click on the arrow/link text for each metric. The screen will expand to show the detailed metrics entered for each performance indicator. If no data was entered, you'll see the text "No Data Entered."

Call Volume

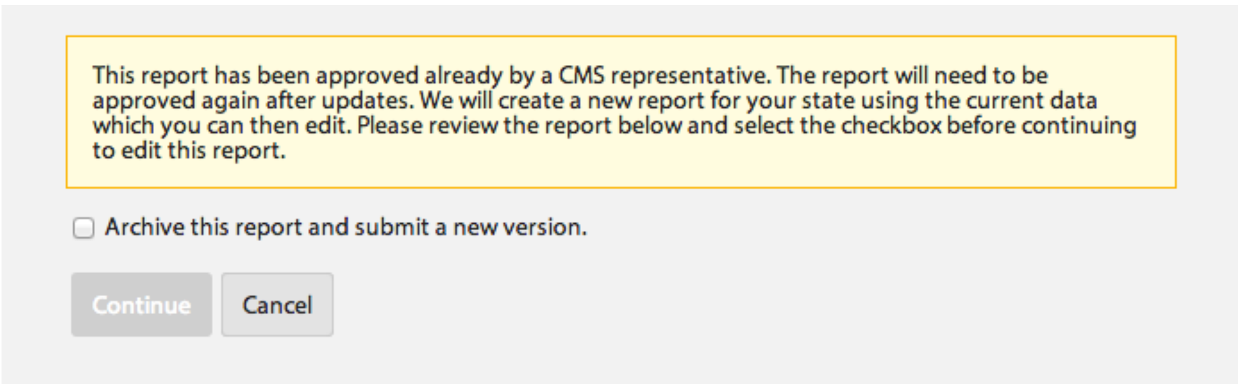
INDICATOR	VALUE
▼ Total Call Center Volume	5,600
Boulder	789
Denver	837
Colorado Springs	No Data Entered
Call4	No Data Entered
Call5	No Data Entered
Call6	No Data Entered
Call7	No Data Entered
Call8	No Data Entered
Call9	No Data Entered
Call10	No Data Entered

Data Limitation: No Data Entered

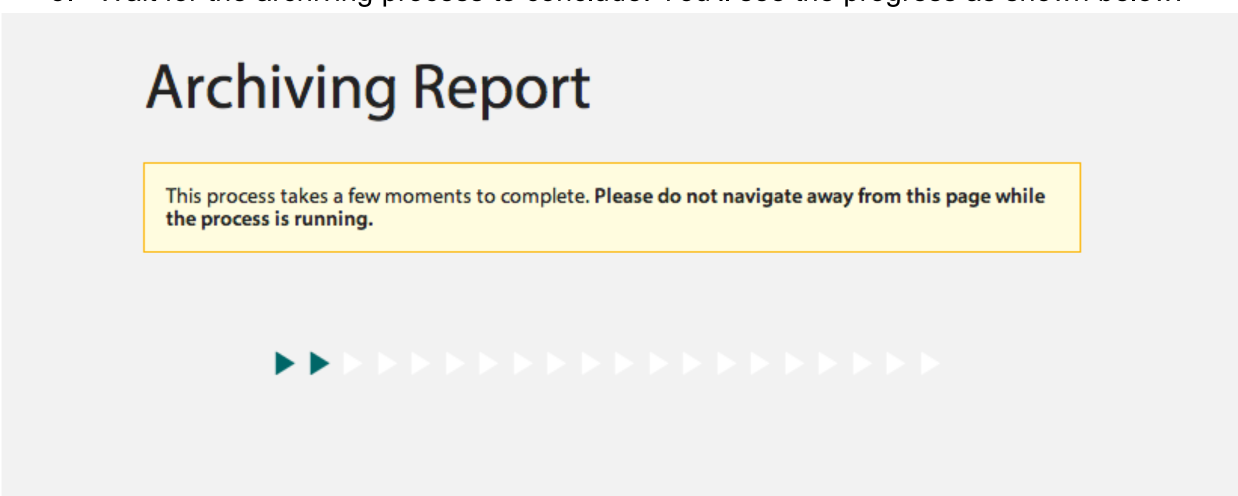
Updating Previously Submitted Reports
To update a previously submitted report, please note the following:

- Reports that have been submitted by the state but not CMS will need to be re-submitted by the state prior to review by CMS.
- Reports that have been submitted by the state and validated by CMS require the following steps to be completed:

1. Click "Edit" report.
2. At the bottom of the report, note the following warning and actions:



3. To edit the report, click the box to: "Archive this report and submit a new version."
4. Click "Continue" to finalize the archiving.
5. Wait for the archiving process to conclude. You'll see the progress as shown below:



6. After the report is archived, you'll be taken to an editable version of the report. You will need to re-submit this edited version for both state and CMS validation.